Agent Performance Evaluation

Complete for each agent at the end of the review period. Metrics come from the reporting system and QA tool; the team lead adds ratings and comments. Rating scale: 1 = Below expectations, 2 = Partially meets, 3 = Meets, 4 = Exceeds, 5 = Far exceeds.

AGENT AND REVIEW DETAILS

Agent name

Employee ID

Team / queue / program

Team lead

Hire date

Review period start

Review period end

Review type

☐ Post-nesting (30/60/90 day) ☐ Quarterly ☐ Semiannual ☐ Annual
☐ Promotion or tier review

Days on leave during the period (excluded from metrics)

PERFORMANCE METRICS (TARGET VS ACTUAL)

Quality / QA score: target

Quality / QA score: actual (number of evaluations)

Compliance failures on evaluated contacts

Average handle time: target

Average handle time: actual

First contact resolution or repeat-contact rate: target / actual

Customer satisfaction (CSAT or survey score): target / actual (survey count)

Schedule adherence: target / actual

Transfer or escalation rate: target / actual

Sales, retention or conversion: target / actual (if applicable)

Metric rating

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments on metric trends during the period

COMPETENCIES

Customer focus and empathy

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Product, policy and process knowledge

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Problem solving and ownership of the issue

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Communication (clarity, tone, written accuracy)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Systems and documentation accuracy

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Response to coaching and feedback

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Teamwork and conduct

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Examples supporting the ratings above

ATTENDANCE AND RELIABILITY

Unplanned absences (excluding protected leave)

Tardies

Attendance points at end of period

Attendance rating

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

STRENGTHS AND DEVELOPMENT

Top strengths this period (with specific examples)

Areas to develop

Coaching sessions held this period

Goals for next period (measurable, with target dates)

Training or support the agent will receive

Career interest (team lead, QA, trainer, WFM, other skill)

OVERALL RATING

Overall performance rating

☐ 1 - Below expectations ☐ 2 - Partially meets ☐ 3 - Meets ☐ 4 - Exceeds
☐ 5 - Far exceeds

Recommended action

☐ None ☐ Merit increase ☐ Tier or skill upgrade ☐ Promotion consideration
☐ Performance improvement plan

Agent comments

SIGNATURES

Agent signature (acknowledges receipt, not agreement)

Date

Team lead signature

Date

Operations manager signature

Date

Date reviewed with agent